This guide contains information for the Practice CS® Data Conversion Service for PPC Trackker.™ Thomson Reuters provides the Practice CS Data Conversion Service to convert your firm’s data quickly, smoothly, and accurately. This information kit explains the data conversion process in detail and provides specific information about converting from PPC Trackker.

How to use the Practice CS Data Conversion Service

1. Read this information kit carefully.

2. Back up your PPC Trackker data, and send the backup to the Practice CS Data Conversion Service.

3. The Practice CS Data Conversion Team will convert your PPC Trackker firm data and return it to you in a converted Practice CS firm data package.
What to expect from the data conversion

The overall objective of the PPC Trackker to Practice CS conversion process is to provide a comprehensive conversion of PPC Trackker data into Practice CS. However, due to software differences between PPC Trackker and Practice CS, some PPC Trackker data cannot be converted. Therefore, you should not expect to exactly duplicate results from PPC Trackker using the converted data without adding or modifying the appropriate data in Practice CS. See the “Detailed information on items converted and not converted” section of this document for a listing of items converted and not converted. Continue reading to learn all of the details regarding the conversion process and the steps you will need to follow.

Understanding the conversion process

Because converting firm data files from PPC Trackker to the Practice CS format is a complex and time-consuming process, the Practice CS Data Conversion Team will convert the firm files for you. All you have to do is schedule a data conversion appointment, back up your firm data files, and send the data files to the Practice CS Data Conversion Team.

The Practice CS data conversion will take your PPC Trackker data and transfer it to the Practice CS format.

Confidentiality

We acknowledge that your firm will be submitting data containing personal and financial business information. Thomson Reuters treats all data submitted as sensitive, confidential, and private. The Practice CS Data Conversion Team uses data submitted for conversions solely for data conversion purposes, in a secure environment, and does not retain any portion of this data for any purpose. For more information, you can access our Privacy Policy from the bottom of any page on our website, CS.ThomsonReuters.com.

Steps for using the Practice CS Data Conversion Service

Step 1: Read this Information Kit

Please read this information kit carefully. Information such as the items transferred during conversion will help answer your questions and let you know what to expect from the Practice CS Data Conversion Service.

Step 2: Prepare your firm data

Your entire firm database will need to be sent for conversion. To find the location of your firm’s database, open your PPC Trackker database and choose File > Properties. The database location will be listed here. For more detailed instructions, refer to the section entitled “Backup instructions for PPC Trackker.”
Step 3: Send your firm’s data to Thomson Reuters

When your conversion was scheduled, an SDE site for your firm was set up. Information on how to access the SDE site is included in the Appointment Confirmation form sent during the appointment. Copy and paste your data file to the Thomson Reuters SDE site.

Please be sure to keep a copy of the backup you submitted to us.

Step 4: Receive your converted data

Once the Practice CS Data Conversion Team receives your firm’s data, we will process it promptly at our corporate facilities in Ann Arbor, Michigan. Upon completion of the conversion, you will be contacted by the Practice CS Data Conversion Team. The converted data will be returned to you via the SDE site in Practice CS backup format. This is the same SDE site used to submit your data. Items on the SDE site will include:

- The original backup of firm data you submitted for conversion.
- The backup of converted Practice CS firm data.
- Instructions for using your converted firm data and files found on the SDE site.
- Practice CS Data Conversion Service document(s).
- Conversion data transfer report.
- Any additional information you need to know regarding your firm data.

Backup instructions for PPC Trackker

The Practice CS Data Conversion Team needs a copy of the data files from within PPC Trackker. The data directory can be found by choosing File > Properties while the database is open in PPC Trackker.

The file needed is in the format Name.TRW, where Name is the designation that was given to the file when it was created in PPC Trackker. If the data is not in the default location, you can choose Start > Search and perform a search for *.TRW files.

Detailed information on items converted and not converted

Types of conversions offered

The PPC Trackker to Practice CS conversion is demographic only. The converted data includes only identifying information for clients, staff, and contacts, such as their names, addresses, and phone numbers, as well as practice management system configuration settings such as activities. The converted data does not include any portions of time and billing elements (time, expenses, invoices, receipts, and adjustments).

Items transferred during conversion

The Practice CS Data Conversion Service transfers the following data items from PPC Trackker into Practice CS.

- Activities: Activity ID and description.
Notes

- The Practice CS import requires the class to be set. Class does not exist in PPC Trackker, so it defaults to “Billable.”
- The Practice CS import requires the rate type to be set. Rate type does not exist in PPC Trackker, so it defaults to “No rate.”
- The Practice CS import requires the activity method to be set. Activity method does not exist in PPC Trackker, so it defaults to “Time.”
- The Practice CS import requires the surcharge method to be set. Surcharge method does not exist in PPC Trackker, so it defaults to “No surcharge.”
- The Practice CS import requires the status to be set. Status does not exist in PPC Trackker, so it defaults to “Active.”

Clients: Client ID, name, individual first name, individual last name, address, phone numbers, federal ID, state ID, comments, email address, year end, entity, staff assignments, and sort name.

Notes

- The Practice CS import requires the class to be set. Class does not exist in PPC Trackker, so it defaults to “Client.”
- The Practice CS import requires the status to be set. Status does not exist in PPC Trackker, so it defaults to “Active.”

Firm: Name, address, phone numbers, email address, and federal TIN.

Notes

- The two phone numbers from PPC are converted to business and fax, respectively.
- The current period defaults to the month of the current system date.

Staff: Staff ID and name.

Note: The Practice CS import requires the status to be set. Status does not exist in PPC Trackker, so it defaults to “Active.”

Grouping: Staff classifications, departments, and client entity types.

Items not converted

The following items are not converted due to differences in data structures between PPC Trackker and Practice CS. After the conversion, enter the applicable items before you begin using Practice CS.

- Reports
- Security levels
- Tasks
- Status codes
- Client business types
- Default services
Suggestions for reviewing the converted data

The Thomson Reuters conversion software used to convert firm data from PPC Trackker has been thoroughly tested by our development staff. However, we recommend that you carefully review the converted data. We suggest that you review the following common areas:

- Client list and a few select clients’ general information
- Staff list and a few select staff members’ general information
- Activities and setup

Firm data transfer reports

Firm Data Transfer reports contain information for your converted firm data. These reports will be located in the directory with your converted data in the format NAME_M.pdf.

Most of the items noted on the reports are strictly informational, though you may want to take action immediately on such items as abbreviations, truncations, and so on. We provide these reports simply to alert you to any differences in the data as a result of the conversion process. In most instances, no action is required.

Note: Some databases may produce very large reports. We recommend that you verify the number of pages the report contains before printing. If the report is too large, we suggest that you view it on screen.

Getting help

If you have any questions about the conversion process, please contact your conversion specialist. Our professional staff will be glad to assist you.